FAQ – Frequently Asked Questions

What are the Results Kits?

The Results Kits are an essential part of turning the training into results.

- **The Referral Success Guide** is the workbook and reference guide that participants use during the lesson.
- **The Referral Scripts Book for Financial Professionals** will serve as a tremendous reference as your reps endeavor to find their own words in all aspects of the referral process: planting seeds, asking for referrals, dealing with objections, getting introduced, calling their prospects, and more.
- **The Introductions Journal** serves as a constant reminder to your reps to engage in the referral process and serves as a place to collect all their new prospect information, treating the process with importance, and making sure no one falls through the cracks.
- **Blueprint for Referral Success**, an audio program, is something they can listen to over and over again as they drive to appointments – to renew their strategies and motivation.
- **Defusing Referral Objections**, a Video, will give them more depth into how to deal with referral objections.

If all the items were purchased separately from our website, the Kit would run $155. This is a tremendous investment in producing results with this program. Many firms like to have the reps pay for the Results Kit as a way to have “skin in the game.” Some will reimburse that investment if the reps hit certain marks.

How do I get more Results Kits when I want to run another training session?

Getting additional Results Kits is easy. Simply call any of RCI’s staff at 301.497.2200 or send an email to info@referralcoach.com.

How long does it take to get the program?

All elements of all modules are usually in stock and are typically shipped within 1-3 working days from when the order is placed. (Large orders may take longer or can be split into partial shipments. All elements of the program can be shipped via overnight delivery if desired (within the United States).

What is the purpose of the purchase agreement?

The Purchase Agreement is about commitment. It is your commitment to deliver the training in the way it was meant to be delivered, so each rep has the maximum opportunity for success. We’ve had clients attempt to deliver the training without the Results Kit and they told us that they regretted trying it. It’s just not the same experience for the participants – therefore – not the same results for you. While we ask you to purchase a Results Kit for every new participant in the program, it is not necessary to do so when your reps repeat the program or use the program in sections as a reinforcement session.

THE REFERRAL ADVANTAGE™ VIDEO TRAINING PROGRAM

REFERRALCOACH™ INTERNATIONAL

FAQ – Frequently Asked Questions – CONTINUED

Can the modules be used as a self-study program?

The Core Module, Module 1, is designed for group learning and skills practice. Participants benefit from the interaction and role-playing activities built into the program. The DVDs for this module could be used as a reinforcement tool for individuals who go through the group session. Be careful, though. Keep close tabs on who you lend the DVDs to – so they don't go missing. (This happens!)

Modules 2-6 are also best done in a group setting, but lend themselves to individual study. We recommend that, instead of just one person using them for self-study, your reps team up in groups of 2 or more ("referral buddies") to discuss and practice the techniques delivered in these modules.

Can each module be used as a stand-alone training program?

Yes, all six modules stand alone in their own right. However, if you purchase the entire set, you can deliver quality, referral-related, training over a long period of time, thus strengthening your referral culture.

Are all the modules suited to all levels of advisors?

While any advisor at any level will benefit from each of the modules, it is clear that some are better suited for rookies and others for veterans. Here is how we see these modules fitting different LOS groups (Length of Service):

Module 1 – Prospecting for Introduction: All LOS

Module 2 – Enhancing Referability: All LOS

Module 3 – High-Quality Clients from CPAs: LOS 3 +

Module 4 – Leveraging Your Natural Market: LOS 0 to 5

Module 5 – Expanding Your Natural Market: LOS 0 to 6

Module 6 – Social Event Prospecting: LOS 2+

How do the reps get signed up for Rapid Fire Referrals™?
We recommend you activate Rapid Fire Referrals™ (The Habit Maker) as your reps finish the Module 1. Simply send to us an Excel File containing their First Name, Last Name, and Email Address.

Send this file to Jennifer.Kreitzer@ReferralCoach.com